

Internal MERS® System Administrator

A Member's internal MERS® System Administrator ("Sys Admin") is responsible for establishing and maintaining the security settings that control user access to its Org ID, including: create and maintain the security roles that align with the Member's operations, create and maintain a unique User ID for Member each employee that requires online access to MERS® System or the Member website, and re-enable disabled User IDs. Multiple Sys Admins may exist for an Org ID. Another internal Sys Admin for a Member or the [Help Desk](#) can reset a disabled Sys Admin User ID.

MERS® System uses ICE Single Sign-on ("ICE SSO") for user authentication. ICE SSO allows an authenticated user to access MERS® System which includes MERS® RON Video Storage, MERS® eRegistry, MERS® Member Website, and many other MERS® applications in the same browser session without having to log on again.

A user's ICE SSO login credentials consist of the Global ID (user's work email address) and SSO password. When your Sys Admin creates a new user in MERS® System, a Global ID is automatically created for the user in ICE SSO if none exists. Access to the Member Website and other supporting MERS® Corporate Applications is also provisioned for the user. The new user is sent an email from ICE SSO with instructions to set up a password. If a user already has a Global ID, the same access is provisioned to the user's existing Global ID, and the user is sent a confirmation email.

Although transaction processing is not permitted while MERS® System is in read-only mode, a Sys Admin may perform any user administration function the user's role permits while MERS® System is in read-only mode. Changes to a User ID automatically update the user's SSO Global ID but not the user's MERS® eRegistry User ID. Password resets are performed by users in the ICE SSO application. See the [Change Password QRG](#) for details.

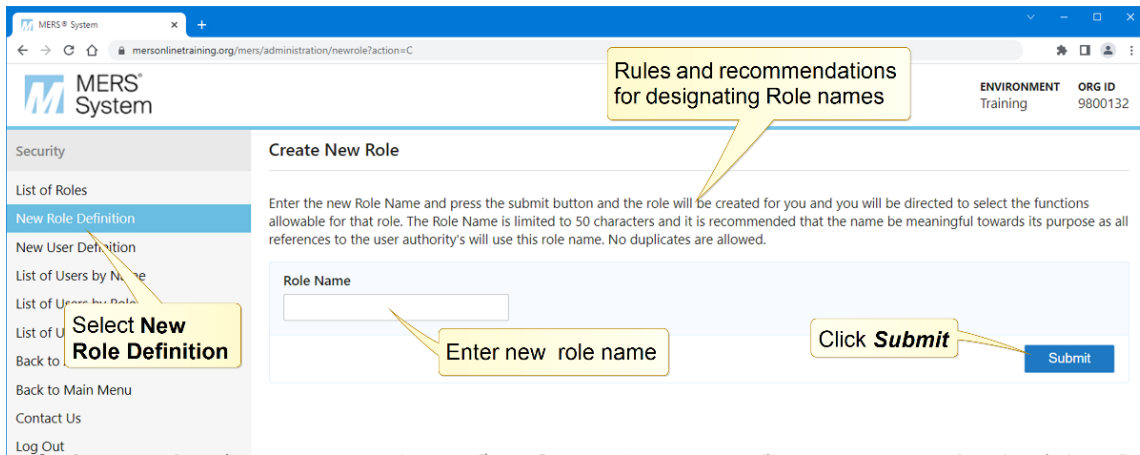
When your internal Sys Admin disables or "deletes" a User ID, the user's access to MERS® System, Member Website, and other MERS® applications is also disabled, but not the user's MERS® eRegistry User ID if one exists.

Reports:

- *User Security Audit Report (MP)*: Optional weekly report that lists all User IDs for an Org ID and groups them by their status (Active, Deleted, and Disabled) and indicates if the User ID is assigned the Sys Admin role.
- *Inactive User Tracking (MQ)*: Optional daily report that lists active users for an Org ID within 14 calendar days of being disabled for inactivity. The *MQ Report* is only generated if **Disable Inactive Users Days** option is enabled.

Create New Role

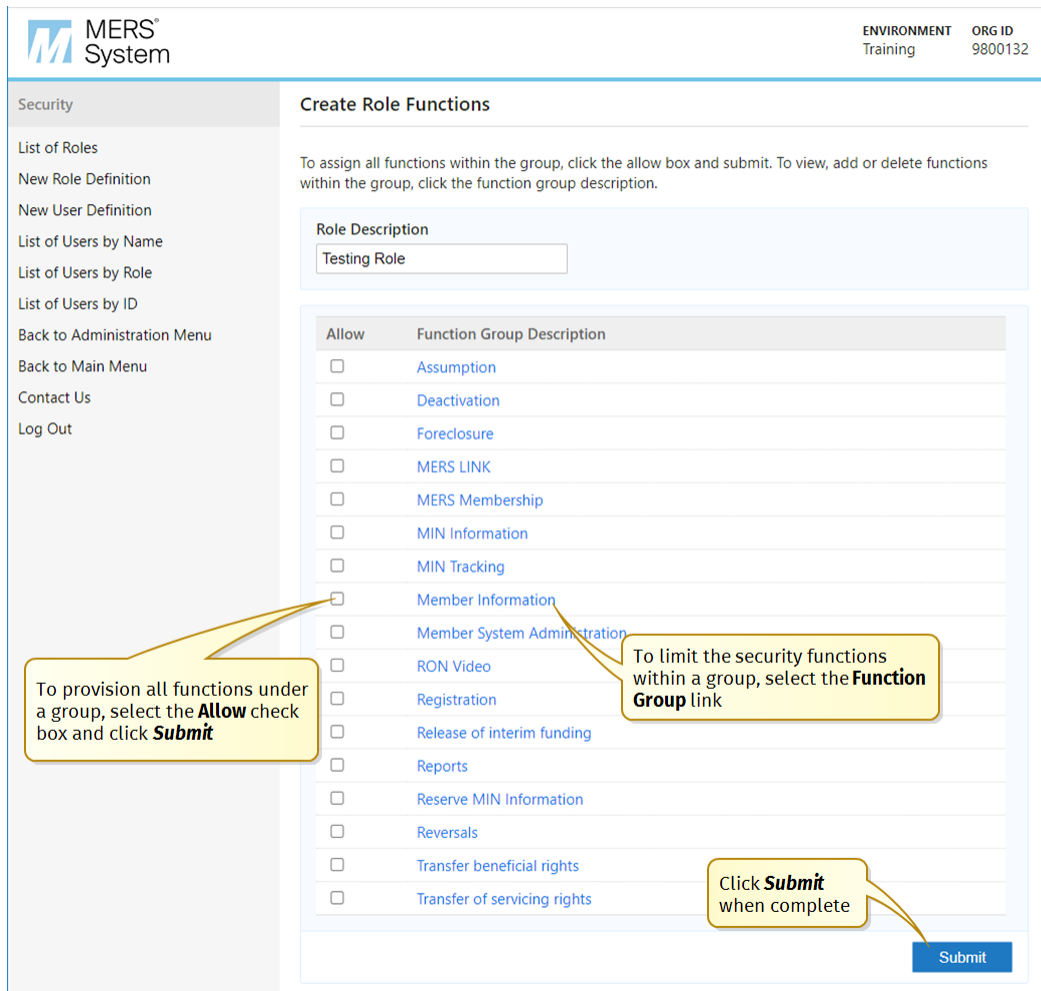
(Main Menu > Administration > Security > New Role Definition)



The screenshot shows the 'Create New Role' page in the MERS System. The left sidebar contains a 'Security' menu with options: 'List of Roles', 'New Role Definition' (highlighted), 'New User Definition', 'List of Users by Name', 'List of Users by Role', 'List of Users by Org ID', 'Back to Main Menu', 'Contact Us', and 'Log Out'. A yellow callout points to 'New Role Definition' with the text 'Select New Role Definition'. The main content area is titled 'Create New Role' and includes instructions: 'Enter the new Role Name and press the submit button and the role will be created for you and you will be directed to select the functions allowable for that role. The Role Name is limited to 50 characters and it is recommended that the name be meaningful towards its purpose as all references to the user authority's will use this role name. No duplicates are allowed.' A yellow callout points to the 'Role Name' input field with the text 'Enter new role name'. Another yellow callout points to the 'Submit' button with the text 'Click Submit'. A third yellow callout points to the top right of the page with the text 'Rules and recommendations for designating Role names'. The top right corner shows 'ENVIRONMENT Training' and 'ORG ID 9800132'.

Assign Function Groups:

Your System Administrator uses the *Create Role Functions* page to assign security roles to the role.



MERS System ENVIRONMENT: Training ORG ID: 9800132

Security

- List of Roles
- New Role Definition
- New User Definition
- List of Users by Name
- List of Users by Role
- List of Users by ID
- Back to Administration Menu
- Back to Main Menu
- Contact Us
- Log Out

Create Role Functions

To assign all functions within the group, click the allow box and submit. To view, add or delete functions within the group, click the function group description.

Role Description:

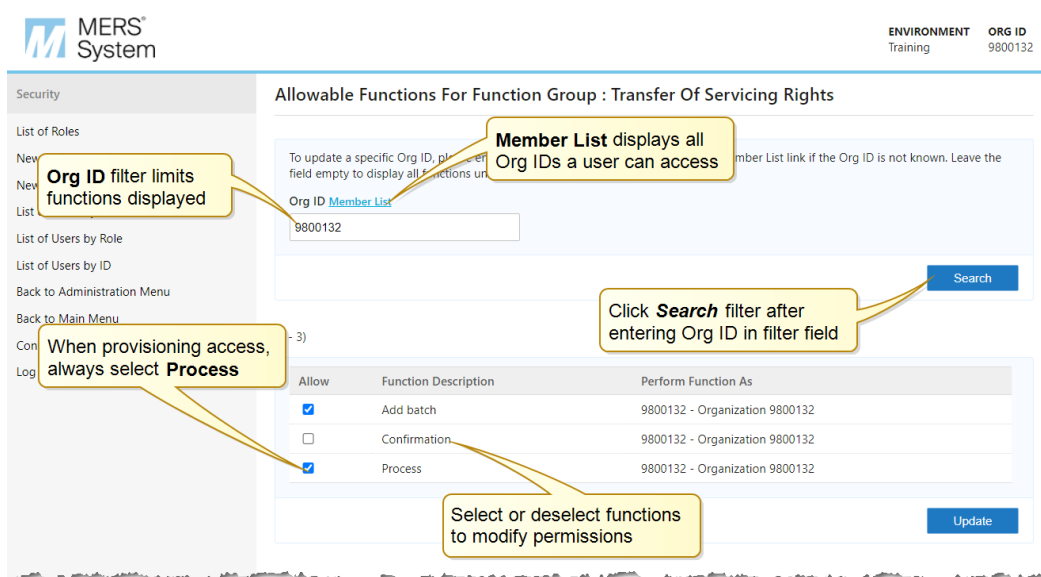
Allow	Function Group Description
<input type="checkbox"/>	Assumption
<input type="checkbox"/>	Deactivation
<input type="checkbox"/>	Foreclosure
<input type="checkbox"/>	MERS LINK
<input type="checkbox"/>	MERS Membership
<input type="checkbox"/>	MIN Information
<input type="checkbox"/>	MIN Tracking
<input type="checkbox"/>	Member Information
<input type="checkbox"/>	Member System Administration
<input type="checkbox"/>	RON Video
<input type="checkbox"/>	Registration
<input type="checkbox"/>	Release of interim funding
<input type="checkbox"/>	Reports
<input type="checkbox"/>	Reserve MIN Information
<input type="checkbox"/>	Reversals
<input type="checkbox"/>	Transfer beneficial rights
<input type="checkbox"/>	Transfer of servicing rights

Submit

Callouts:

- To provision all functions under a group, select the **Allow** check box and click **Submit**
- To limit the security functions within a group, select the **Function Group** link
- Click **Submit** when complete

Assign Individual Functions to Role within Function Group



MERS System ENVIRONMENT: Training ORG ID: 9800132

Security

- List of Roles
- New Role Definition
- New User Definition
- List of Users by Name
- List of Users by Role
- List of Users by ID
- Back to Administration Menu
- Back to Main Menu
- Contact Us
- Log Out

Allowable Functions For Function Group : Transfer Of Servicing Rights

To update a specific Org ID, please enter the Org ID in the filter field empty to display all functions under the function group.

Org ID:

Search

Allow	Function Description	Perform Function As
<input checked="" type="checkbox"/>	Add batch	9800132 - Organization 9800132
<input type="checkbox"/>	Confirmation	9800132 - Organization 9800132
<input checked="" type="checkbox"/>	Process	9800132 - Organization 9800132

Update

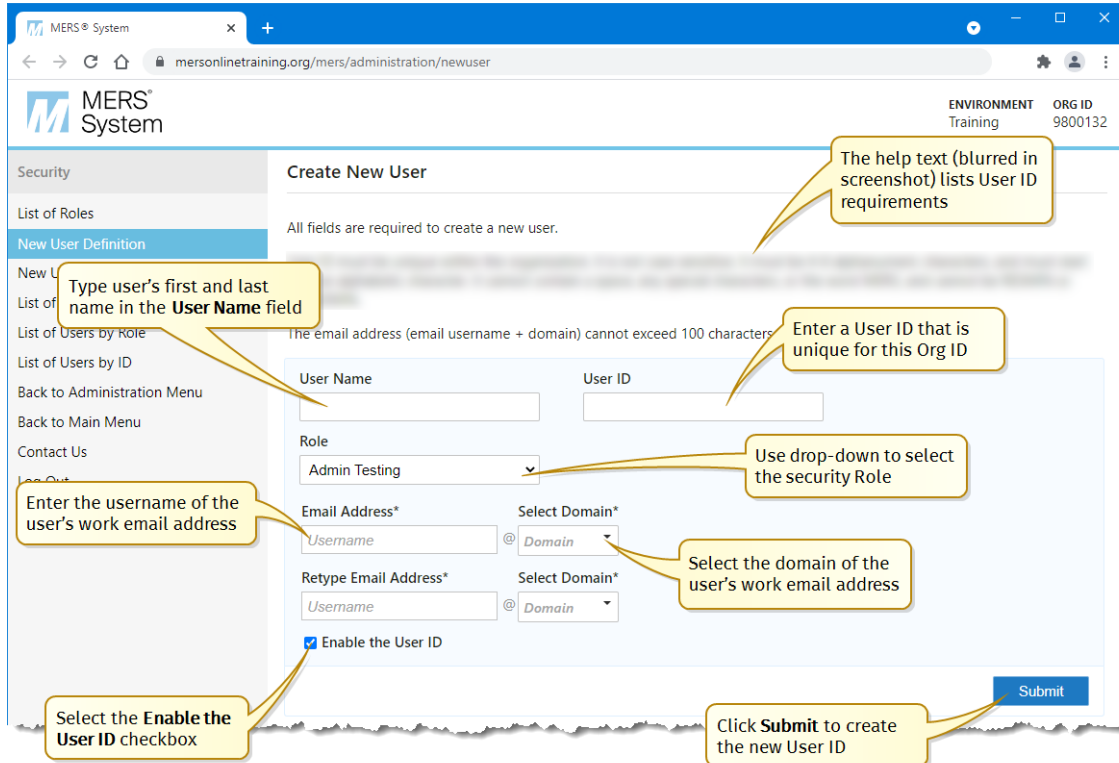
Callouts:

- Org ID filter limits functions displayed
- Member List displays all Org IDs a user can access
- Click **Search** filter after entering Org ID in filter field
- When provisioning access, always select **Process**
- Select or deselect functions to modify permissions

See [Available Functions in MERS® System](#) for the descriptions of each function.

Create User

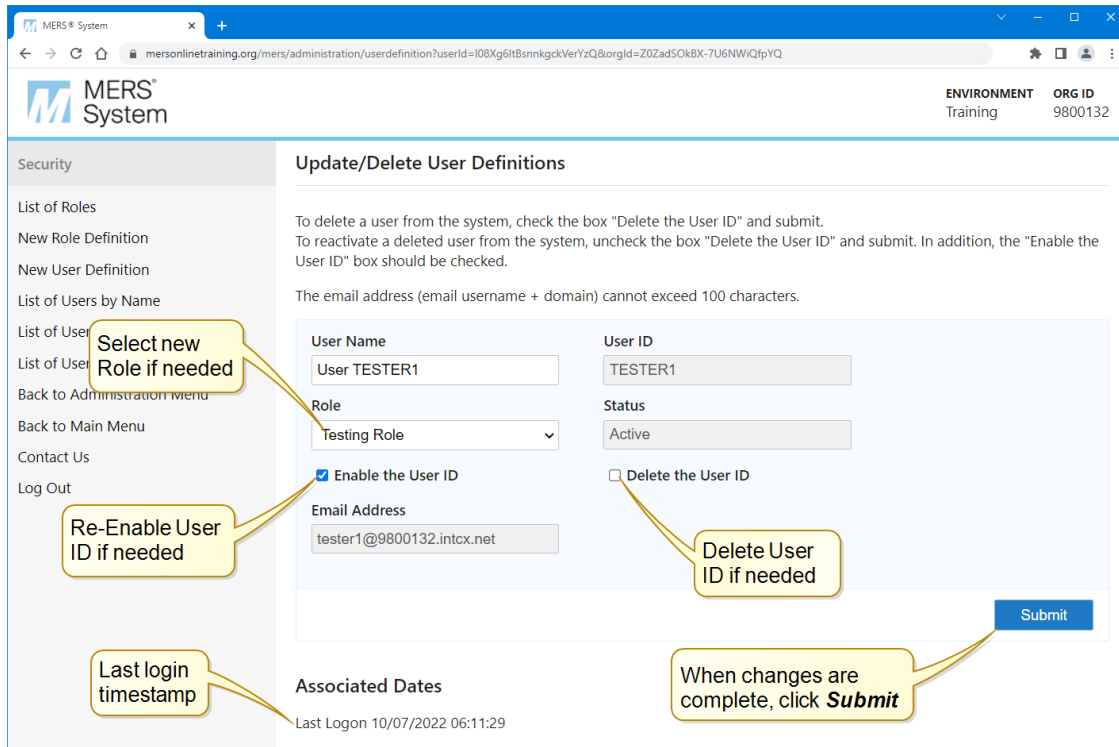
After a Role has been established, User IDs must be created and attached to the Role to allow sign on. From the *Security Menu*, select **New User Definition**.



The screenshot shows the 'Create New User' form in the MERS System. The form includes fields for User Name, User ID, Role, Email Address, and Retype Email Address. There are also checkboxes for 'Enable the User ID' and a 'Submit' button. Callouts provide instructions: 'Type user's first and last name in the User Name field', 'The help text (blurred in screenshot) lists User ID requirements', 'Enter a User ID that is unique for this Org ID', 'Use drop-down to select the security Role', 'Select the domain of the user's work email address', 'Enter the username of the user's work email address', 'Select the Enable the User ID checkbox', and 'Click Submit to create the new User ID'.

Update Existing User

A Sys Admin updates an existing User ID on the *Update/Delete User Definitions* page. From one of the three *List of Users* pages, click the User ID you need to update.



The screenshot shows the 'Update/Delete User Definitions' form in the MERS System. The form includes fields for User Name, User ID, Role, Status, Email Address, and checkboxes for 'Enable the User ID' and 'Delete the User ID'. There is also a 'Submit' button. Callouts provide instructions: 'Select new Role if needed', 'Re-Enable User ID if needed', 'Delete User ID if needed', 'Last login timestamp', and 'When changes are complete, click Submit'.

Field	Description
User Name	The user's full name. Update as needed.
User ID	The unique identifier for the user in MERS® System. Cannot be modified.
Role	The current role assigned to the User ID. To assign a different role, select it from the dropdown.
Status	Displays the current status of the User ID.
Enable the User ID	Disabled User IDs are listed under the Disabled tab. Select the Enable the User ID checkbox to re-enable a User ID and allow the user to logon to MERS® System. Uncheck the checkbox to disable a User ID and prevent further MERS® System logins.
Delete the User ID	"Deleted" User IDs are listed on the Deleted tab. Select the Delete the User ID checkbox to delete an active or disabled a User ID. The deleted User ID is retained on the database and may be reactivated if needed. Uncheck the checkbox to reactivate a deleted User ID.
Email Address	The work email address of the user. Contact Help Desk to update a user's email address.
Submit	Submits the update. If successful, a success page displays.

Available MERS® System Security Functions

The table below lists all MERS® System security functions in use. The security functions available to an Org ID are determined its Line of Business (LOB). There are unused security functions in MERS® System that do not control existing functionality; these are not described. If a function listed below is not displayed when editing a role for your Org ID, it is not available to your Org ID. Refer to the [MERS® System User Guide](#) for the lists of security functions available to each LOB.

Example: To configure a security role to initiate *Transfer of Servicing* transactions, your system administrator would select the **Transfer of servicing rights** Function Group and enable the **Add batch** and **Process** functions from that Function Group as noted in the **Function Group (Functions)** column of the table below.

Available Functions	Function Group (Functions)
Add Modification	MIN Information (Update Modification Agreement tab, Add modification agreement, Process)
Add Original Borrowers	MIN Information (Add original borrower, Process)
Assumption	Assumption (Process)
Change Member to Affiliate, Secondary Org ID, or Client's Org ID	Member Information (Process Member Change)
Confirm TOB	Transfer of beneficial rights (Confirmation, Process)
Confirm TOS	Transfer of servicing rights (Confirmation, Process)
Create New Role	Member System Administration (Create Role, Process, View)
Create New User ID	Member System Administration (Create New User ID, Process, View)
Deactivate-Assigned from MERS for Default or Bankruptcy	Foreclosure (Process Assigned from MERS for dflt or Bnkruptcy, Process all Foreclosures)
Deactivation Reversals	Reversals (Process Deactivation Reversal, Process)
Delete Modification	MIN Information (Update Modification Agreement tab, Delete modification agreement, Process)
Delete Original Borrowers	MIN Information (Delete original borrower, Process)
Initiate TOB	Transfer of beneficial rights (Add batch, Process)
Initiate TOS	Transfer of servicing rights (Add batch, Process)
iRegistration Foreclosure Complete	Foreclosure (Process Foreclosure complete, Process all Foreclosures)
iRegistration Foreclosure Pending	Foreclosure (Process Foreclosure Pending,iRegistration, Process all Foreclosures)
iRegistration Foreclosure Reinstated or Modified	Foreclosure (Process Reinstated (option 3),iRegistration, Process all Foreclosures)

Available Functions	Function Group (Functions)
iRegistration Foreclosure Status Reset	Foreclosure (Process Foreclosure status reset, Process all Foreclosures)
Manage Role (Modify/Delete)	Member System Administration (Process, Update Role)
Manage User ID (Enable/Disable/Delete)	Member System Administration (Process, Update User ID)
MERS® Link Search	MERS LINK (Title Company Search)
MIN Find (View-only All)	MIN Information (View all tabs, Process)
MIN Find (View-only Borrowers)	MIN Information (View Borrower tab, Process)
MIN Find (View-only Investor Loan #, Pool #, Securitization, or Agency ID)	MIN Information (View Misc tab, Process)
MIN Find (View-only Legal Description)	MIN Information (View Legal tab, Process)
MIN Find (View-only Loan Information)	MIN Information (View Loan tab, Process)
MIN Find (View-only Modifications)	MIN Information (View Modification Agreement tab, Process)
MIN Find (View-only Property)	MIN Information (View Property tab, Process)
MIN Find (View-only Summary)	MIN Information (View Summary tab, Process)
MIN Update (Investor Loan #, Pool #, Securitization, or Agency ID)	MIN Information (Update Misc tab, Process)
MIN Update (Legal Description Only)	MIN Information (Update Legal tab, Process)
MIN Update (Loan Information Only)	MIN Information (Update Loan tab, Process)
MIN Update (Property Only)	MIN Information (Update Property tab, Process)
MIN Update (Update All)	MIN Information (Update all tabs, Process)
Modify Modification	MIN Information (Update Modification Agreement tab, Modify modification agreement, Process)
Paid in Full Deactivation	Deactivation (Process Paid in full, Process)
Registration	Registration (Process)
Registration Reversal	Reversals (Process Registration Reversal, Process)
Request Portfolio Analysis Report	Reports (Process Portfolio Analysis)
RON Video Download	RON Video (RON Video Retrieval, RON Video Process)
RON Video Event Log	RON Video (RON Event Log, RON Video Process)
RON Video Upload	RON Video (RON Video Submission, RON Video Process)
Transfer to Non-MERS Status Deactivation	Deactivation (Process Transfer to a Non-MERS servicer, Process)
Update Corporate Name/Address	Member Information (Update Member Info, Process Member Info)
Update Member Profile Options	Member Information (Update Member Info, Process Member Info)
Update MERS® System Contacts	Member Information (Update Member Info, Process Member Info)
Update Optional Reports	Member Information (Update Member Info, Process Member Info)
Update Primary/Co-Borrowers	MIN Information (Update Borrower tab, Process)
Update Relationships	Member Information (Update Member Info, Process Member Info)
Update Transaction Default Settings	Member Information (Update Transaction Default Settings, Process Member Info)
View Milestones	MIN Information (View Milestones tab, Process)
View MIN Audit	MIN Information (View MIN Audit tab, Process)
View MIN Transfer Audit	MIN Information (View MIN Transfer Audit tab, Process)
View Reports	Reports (View Reports)
View/download MRE	Reports (View Member Reconciliation Files)
View-only Member Information	Member Information (View Member Info, Process Member Info)
View-only User IDs and Roles	Member System Administration (Process, View)